



ucare

## **The Caregiver Guide**

### **Module 11**

## **Hiring, Training and Managing Personal Assistants**

### **Leader Guide**

# Module 11

## Hiring, Training and Managing Personal Assistants

### PURPOSE

---

Personal assistance services may be one of the important support systems that caregivers have. Module 11 is designed to help caregivers learn how to advertise, interview, select, teach, resolve conflict, fire, avoid theft, and find funding.

### OBJECTIVES

---

**After completing this module, participants will**

1. Know where to advertise for applicants.
2. Learn how to interview and select personal assistants.
3. Identify the steps needed to teach new tasks.
4. Learn how to resolve conflict.
5. Understand how to avoid theft and fire, if necessary.
6. Learn what funding options are available.

## SLIDE 1

---

### UCare: The Caregiver Guide Hiring, Training and Managing Personal Assistants

## INTRODUCE

---

Introduce yourself and allow everyone present to introduce themselves and explain their role.

## NOTE

---

This is an excellent time to set the tone of the training. Be friendly, relaxed and focused. Remember names.

## ASK

---

What would you like to get out of the training today?

## NOTE

---

Put responses on a white board and during the training refer back to them and put a check by specific topics discussed.

## TELL

---

The handouts are yours to take home. There is room to write on handouts during the training session.

## SLIDE 2

---

**After completing this module participants will be able to:**

- Know where to advertise for applicants
- Learn how to interview and select personal assistants
- Identify the steps needed to teach new tasks
- Understand how to resolve conflict
- Recognize how to avoid theft and fire, if necessary

- Learn what funding options are available

## SLIDE 3

---

Personal assistance services may be one of the most important support systems for caregivers and their family members.

## TELL

---

In this workshop we will be giving examples of our experiences that may be difficult for some. Remember to respect the confidentiality of the group members. What is shared among the group does not leave the room.

A personal assistant, or PA, can take over the chores that you don't want or know how to do, or private chores that your family member would rather have someone else do. PAs can increase your quality of life and make things easier for you.

## SLIDE 4

---

### **Advantages**

#### **Personal assistants (PA) can:**

- Give you a much needed break
- Lighten your duties
- Give you a chance to do other things
- Prevent/postpone your family member from going to a nursing home or other facility
- Possibly help your family member feel like less of a burden

## ASK

---

Can you think of any other advantages or reasons to hire a personal assistant? Now let's talk about the potential disadvantages.

## SLIDE 5

---

### **Disadvantages**

#### **Potential problems to think about:**

- Lessens your privacy
- Safety and security can also be concerns
- May feel like you're not fulfilling your duty
- Resistance of family member

## TELL

---

We will discuss ways to help you feel safer in this training. Remember that your duty is to provide love and make sure your family member's needs are met. You don't have to do everything yourself. If your family member is resistant, it will help if you discuss and make the decision jointly. You might be able to get them to agree to a trial. Are there any other disadvantages?

## ASK

---

Has anyone here hired a personal assistant? If so, what were your experiences? Is there anything you would have done differently?

Hopefully this training will make this process easier for you.

## SLIDE 6

---

### **What type of person to hire?**

- What qualifications or personal characteristics are you looking for?
- It's best if a personal assistant is at least 18 years of age.
- However, some individuals who are 16 or 17 may be suitable.

## SLIDE 7

---

### **A personal assistant should:**

- Relate well with people and work closely with others
- Accept responsibility and want to learn the job
- Look beyond the disability to see the person
- Maintain clean personal habits
- Have reliable transportation

## ASK

---

Does it matter if the person you hire is a friend or family member?

## DISCUSS

---

Some people prefer family members because of the personal nature of the job. Others feel that hiring someone else helps preserve their relationships. There are advantages and disadvantages to both. Once you know your personal assistance needs and the type of employee you want to hire, you need to get the word out!

## ASK

---

Where can you advertise for personal assistants? Many people use word-of-mouth. Tell your friends, family members, and other people who employ personal assistants that you want to hire a good person. The more people you tell, the more likely you are to find skilled applicants.

## SLIDE 8

---

### **List job opening at:**

- Schools and colleges
- Local Workforce Services
- LDS Employment Offices
- Web sites such as [www.monster.com](http://www.monster.com), [www.ajb.dni.us](http://www.ajb.dni.us)

## SLIDE 9

---

### **Post flyers at:**

- Center for Independent Living
- Senior Citizen Centers, Aging and Retirement organizations
- Hospital, Nursing Homes, Rehab Centers, and Health Dept.
- Library display area, Community center
- Malls, Apartment buildings, Grocery stores

## TELL

---

You can make up a flyer with a brief job description and your phone number (preferably with strips that can be torn off). Post your flyers at a variety of locations within your community.

## ASK

---

Now that you've advertised and have people calling you, what's the best way to screen applicants? Screening over the phone will protect your privacy and security. You can screen out people that may not sound trustworthy or that you wouldn't consider hiring.

## SLIDE 10

---

### **Screening applicants:**

- Screen applicants over the phone first
- Explain the job, where you live, and salary
- Ask if they have any relevant experiences and ask the applicant to describe
- Ask the person why they want to apply
- Arrange for an interview, only if you like what you hear

## TELL

---

Some people feel like it is better to hire someone who is working for the money, than applicants who say they just love to take care of old people. One woman states, “I am the type of person that doesn’t want to be loved by total strangers. It’s better to find someone who needs the money as much as I need the help, rather than someone who wants to be an attendant to feel good about themselves.”

Be aware that many people make an appointment and don’t show. You wouldn’t want to hire someone who isn’t dependable anyway.

## ASK

---

Where is the best place to interview applicants?



## SLIDE 11

---

### **Interviewing:**

- It's safer to interview in a public location to protect your privacy and avoid theft
- If you want to interview in your home, have someone else present

## TELL

---

Let each person know you are careful about security. This may include fingerprinting and listing who you hire with a security agency or the police department. This should discourage applicants you wouldn't want working for you; it shouldn't bother a PA with nothing to hide.

## DISCUSS

---

What kind of questions should you ask applicants when you interview in person? Open ended questions are much better than yes/no questions at getting information. It will help if you make a list of questions you want to ask beforehand.

## ASK

---

What are good questions to ask?

## NOTE

---

Put responses on white board.

## SLIDE 12

---

### **Common interview questions:**

- Would you tell me something about yourself?
- What jobs have you had? How long did you work?  
What did and didn't you like?

- Why did you leave your last job?
- Why do you want to work as a personal assistant?
- Have you been responsible for assisting another person before?
- Are you dependable and reliable? How long do you plan to work?

## SLIDE 13

---

### **The interview:**

- Be observant as you interview
- Watch for nonverbal and personal traits
- Listen to what is said, how it is said, and what is NOT said
- Sometimes silence is a good interview technique to get the person to talk and gather information

## ASK

---

How much should you tell the applicant about the work he or she may be doing? Should you hire someone you like on the spot?

## SLIDE 14

---

### **Disclosing and deciding:**

- The applicant needs to know about all of the work. (It's better to be clear in the beginning than have someone quit later)
- Explain the job, the area where you live, and the salary
- Interview more than one applicant
- Give yourself at least overnight before you make a decision
- Call business and personal references

## DISCUSS

---

How many references should you ask for? Make sure you get at least two employment and two personal references from every person you are considering hiring. It is important to check both work and personal references. What questions should you ask?

## SLIDE 15

---

### **Possible questions to ask references:**

- How long have you known the applicant?
- How would you describe the applicant?
- Is the person honest, mature, and dependable? Why or why not?
- Do you have any reservations about this person doing this type of work?
- Employers – Why did this person leave? Would you rehire the person?
- Do you have any additional comments?

## DISCUSS

---

What should you consider before you hire? Should you trust your intuition? You are your best detection instrument. Your first reaction to people will generally predict your future ease with them. Take into consideration your “gut” reaction, the information you learned in the interview, and what his or her references said. What should you be looking for in a personal assistant?

## SLIDE 16

---

### **You should hire someone with:**

- Good references and at least some experience
- A positive and pleasant attitude
- Good communication and listening skills
- An appropriate reason for applying for the job
- A clean and trustworthy appearance
- Respect for your privacy and confidentiality

## ASK

---

What if you like the applicant, but just aren't sure?

## DISCUSS

---

If you have doubts, keep asking questions, checking references or consider hiring the person on a trial basis. Decide with the personal assistant how long you think the trial period should last. At the end of that time you and/or the personal assistant can decide if you want to continue working together.

## ASK

---

After you have hired someone, you need to get ready. What information does your provider need to know? Written medical information is important so a new personal assistant will know your family member's needs and what to expect.

## SLIDE 17

---

### **Medical information:**

- Basic information about disability
- Medication and possible side effects
- Diet restrictions
- Equipment and home arrangements
- What to do in case of medical situations
- Name and contact information for doctor
- Ensure all of the above is in written form

## ASK

---

Now that you have hired someone and given them basic medical information, what's the best way to teach a new task to your personal assistant?

## SLIDE 18

---

### **Basic teaching steps:**

- Introduce the task
- Provide written instructions
- Explain the steps of the task in detail
- Demonstrate the task (you or another PA)
- Repeat the demonstration as often as needed
- Imitate, have the new PA try the steps of the task
- Refine and correct all steps
- Give feedback, praise or gently correct any mistakes

## DISCUSS

---

How long do you think it will take to train a PA? The training period will vary according to how many, how hard, and how urgent the tasks are. It could range from several hours to

weeks. Everyone learns at their own pace so be patient. You may need to show tasks repeatedly. Give clear directions. Be flexible.

## ASK

---

Should you trust your PA to know how to do things if he or she already has experience?

## SLIDE 19

---

### **Train experienced people also:**

- Supplies and equipment you've used for years may be new
- You may like things done differently than people in prior jobs
- When you teach, show how to do the task the same every time
- Don't assume a PA knows how to perform a task until you've seen it done

## ASK

---

How often should you review work? What should you do if you find problems?

## SLIDE 20

---

### **Reviewing work:**

- The more often the work is checked, the sooner a small problem can be fixed
- Review:
  - Daily tasks/checklists every two weeks
  - Weekly tasks/checklists every month
  - Monthly tasks/checklists every three months
- If there is a problem, see if all the steps are included

- Show PA which step is missing

## DISCUSS

---

What can you do to make your PA feel comfortable on the job?  
How can you let your PA know that your family member is in charge?

## SLIDE 21

---

### **Ways to help your PA feel at ease:**

- Be patient with mistakes and questions: Something clear to you may not be clear to your PA
- Once a task has been learned, do not keep telling the PA how to do it
- Show appreciation for what your PA does well, praise often
- Be kind and respectful, but firm in letting the PA know that your relative's life IS his or her life and your PA is "assisting with" and not "directing" it

## ASK

---

What's the best way to ask your PA to change their behavior?

## SLIDE 22

---

### **Communication skills:**

- Clearly explain any issues
- Use "I" statements which focus on your feelings rather than "You" statements which focus on the other person
- Highlight your reaction and feelings, rather than their actions
- Listen to what your PA says

## DISCUSS

---

Using “I” statements is the preferable method when trying to communicate. For example, if you say something like, “I feel like I am not being treated with respect” it will probably be well received. On the other hand, if say something like, “You treat me like a child,” your PA may feel defensive and criticized. Even though you are still discussing their behavior, the other person may feel less defensive if the focus is on your reaction and feelings, rather than their actions.

## ASK

---

What’s the best way to resolve disagreements? Should you deal with a problem right away?

## SLIDE 23

---

### **Resolving disagreements:**

- Face each issue as it appears
- Be relaxed, clear and listen
- Work together to solve the problem
- Focus on finding solutions, rather than placing blame
- Always attempt to create a win-win solution

## TELL

---

It is important to correct mistakes right away before they become habitual. Try to remain calm even if the other person gets upset. Ask yourself who was at fault. Try to give choices when problem solving and focus on finding solutions, rather than placing blame. It’s easier to resolve issues if at least one person is flexible and willing to consider alternatives. If the PA is not willing to reach an agreement, it may be necessary to ask for a different person from an agency or let that person go.



## ACTIVITY 1

---

### **Practice exercise:**

**Instruction:** Divide into 4 groups. Assign a scenario to each group and give them a few minutes to come up with a solution/response they can report to everyone. If you have a small audience, the leader can read the scenarios to the audience as a whole. After each scenario, ask, What would you do?

1. Your PA has been doing fine except Monday he called to say he would be late. Tuesday he comes in 20 minutes late, but does not call.
2. After three days of work, your PA begins moving utensils, dishes and appliances to different locations, and rearranges items in the closet.
3. Your PA is less enthusiastic. She is a hard worker and you don't want to lose her. She says you don't appreciate her, and that nothing suits you.
4. Your employee comes in to work and you suspect he has been drinking. He smells of alcohol and is unsteady.

## TELL

---

If the group has difficulty coming up with a solution, possible responses may include:

**Response #1:** "I need you to be here on time so we can get the morning routine finished by 10:00. Today you were late and did not call. Reliability is important to me."

**Response#2:** "I have arranged my home so it is easy for me to locate and use things. When you move things around I have to look for them. I would like things left as they are - I want to wear what I had chosen."

**Response#3:** “Are you feeling I don’t like your work? I am pleased with your work. Lately, some problems have been upsetting. I’m sorry. When I get grouchy, just tell me! I want you to continue to work for me.”

**Response#4:** “Drinking alcohol on the job is not allowed. I smell it on your breath and you just bumped into a chair. Please leave now. Call me tomorrow and we can talk about this situation.”

## TELL

---

At the conclusion of the activity, congratulate the audience on their responses. Add any responses given above if the group has trouble coming up with an assertive response.

## DISCUSS

---

Some problems between employee and employer have no solution and the employee needs to be fired. What are some reasons you might have to fire a PA? Mention these reasons if the group does not: If family member’s health is at risk, if there is any type of abuse (sexual, physical, or emotional), or if the PA is impaired from using drugs or alcohol, either on or off the job.

## ASK

---

When is the best time to tell the PA that he or she has to leave?

## DISCUSS

---

It is best not to fire someone in front of others unless you think the person might become violent. If you are not concerned about your personal safety or property, conduct the

firing in a calm, private, respectful, and clear manner. If you are unsure about how the person will react, have someone in another nearby room.

## SLIDE 24

---

### **Preferred ways to end employment:**

- Fire in private, with someone close, unless there are safety concerns
- Provide clear, valid reasons
- Use good eye contact and a firm voice
- Practice what you plan to say
- Ask for your keys and any other items that belong to you
- Conduct the firing at the end of the shift, if possible

## ASK

---

One of the reasons you may have to fire someone includes theft. What are some steps you can take to cut down on dishonesty?

## DISCUSS

---

Know how much money you have and keep only a little on hand. Don't let a PA have access to cash, checkbook or credit cards when you're not around. If you must write a check, give out only one. If you have a live-in PA, set rules about food, visitors, etc. Setting rules and carefully watching behavior will help discourage dishonesty.

## SLIDE 25

---

### **Common-sense steps to cut down on dishonesty:**

- Gently let your PA know you track mileage, calls, etc.
- Lock up or put your money, jewelry and medications away
- Control your checks and cash
- Ask for receipts
- Don't give out your credit card or the number
- Avoid letting a PA use your auto, phone, or home for personal use

## SLIDE 26

---

### **Be careful but don't stress:**

- Don't let these last sections dampen your spirit
- Setting rules and carefully watching behavior will help discourage dishonesty
- It's better to be aware, and take precautions
- Be careful and do what you can to be safe, but don't worry needlessly

## SLIDE 27

---

### **Potential funding sources:**

- Medicaid
- Medicare
- Private, employee, retiree insurance
- Long term care insurance
- Veterans
- Division of Services for People with Disabilities
- Area Agency on Aging

## TELL

---

Medicare pays for prescribed short term care. Medicaid covers more. The Medicaid Aging Waiver or the Physical Disabilities Waiver pays if: 1) an individual qualifies for Medicaid and 2) would go in a nursing home if they didn't receive personal care at home. Medicaid Waiver funding allows the individual to have control over selection, supervision and retention of personal assistants. Your Area Agency on Aging (Utah has 12) knows about funding options and can help. If you aren't eligible for funding, you can consider bartering, using volunteers, or paying for services yourself.

For example, one person with quadriplegia has an arrangement with a friend who has a brain injury who serves as a personal assistant in exchange for organizational help. It sounds perfect, but there are challenges. "It's difficult to live 24 hours a day with someone who has physical impairments and it's difficult to live 24 hours a day with someone who has a brain injury. However, it can work."

## REVIEW

---

- Know where to advertise for applicants - Colleges, Job Service, CILs, Senior Center, Libraries, Stores, Malls, Community Center.
- Learn how to interview and select personal assistants – Screen over the phone. Hire person with good references, experience, positive attitude, good communication skills, good reason for applying, clean and trustworthy appearance, and respect.
- Identify the steps needed to teach new tasks - Introduce, Explain, Demonstrate, Repeat, Imitate, Refine and Give Feedback - Praise or gently correct any mistakes
- Learn how to resolve conflict - Face each issue as it comes, Be relaxed, Clearly explain, Listen to your PA, Work together, Always try for a win-win solution

- Understand how to avoid theft and fire – Provide valid reasons, Use good eye contact and firm voice, Practice what to say, Ask for keys back, Conduct firing at the end of the shift, if possible.
- Learn what funding options are available – Medicare, Medicaid, Veterans, Insurance, Area Agency on Aging, DSPD

## NOTE

---

Review the objectives of audience. Ensure that all were covered.

## TELL

---

There is a two page summary of the hiring and training process that we have covered today at the end of your participant booklet that you can use as a reference.

## SLIDE 28

---

**Take a Break.**

## NOTE

---

Leader should have chosen one of the ‘Take a Break’ exercises from the Leader’s Toolkit.

## TELL

---

We have one activity remaining. An important part of caregiving that is often forgotten is YOU, the caregiver. You need to take care of yourself.

Ask participants:

- What do you do for you?
- Discuss the answer to this question briefly

## ACTIVITY 2

---

- Lead the participants in the ‘Take a Break’ exercise you have chosen.
- Impress on the participants that it is important for them to do something for themselves each day. Ensure they understand the “Take a Break” card. Review with them several times and ask questions to ensure understanding.

## SLIDE 29

---

### **Believe in Yourself**

“You have the colors of a true champion, a hero. Were you born with these colors? No, I think you earned them. Whatever else happens as your life unfurls, you will have the strength and courage you need. Choose your own path. Believe in yourself. You have the power, insight, and wisdom to succeed. For yours are the colors of a hero, a true champion, a caregiver.” Judith Rappaport-Musson from Eldercare 911

## SLIDE 30

---

### **Summary**

Remember that you have courage, strength, compassion, power and wisdom. Thank you for your participation. You’ve been a great audience. Please complete the Feedback Sheet. I welcome your comments and appreciate your interest. I wish you the best in your efforts to care for your family member. If you have additional questions or concerns, I would be happy to talk with you following this presentation.

## Screening, Interviewing and Checking References When Hiring Personal Assistants

Screening Applicants		Tips for interviewing
Screen applicants over the phone first		Be observant as you interview
Explain the job, where you live, and salary		Watch for nonverbal and personal traits
Ask if they have any relevant experiences. If so, ask to describe		Listen to what is said, how it is said, and what is NOT said
Ask applicant why they are applying		Sometimes silence is a good technique to get the person to talk
Arrange for an interview, only if you like what you hear		Tell the applicant about <u>all</u> of the work
Job Interview Questions		Interview more than one applicant
Would you tell me something about yourself?		Give yourself at least overnight before you make a decision
What jobs have you had? For how long?		Reference Check Questions
Why did you leave your last job?		How long have you known the applicant?
Why do you want to work as a personal assistant?		How would you describe the applicant?
Have you been responsible for assisting another person?		Is the person honest, mature, and dependable? Why or why not?
Are you dependable and reliable?		Do you have any reservations about this person doing this type of work?
How long do you plan to work?		Employers – Why did this person leave? Would you rehire the person?
The person you ultimately hire should have:		
Good references and at least some experience		An appropriate reason for applying for the job
A positive and pleasant attitude		A clean and trustworthy appearance
Good communication and listening skills		Respect for privacy / confidentiality



## Training, Supervising, and Managing Personal Assistants

<b>Set a Trial Period</b>	<b>Provide Medical Information</b>
Set a trial period with the PA	Basic information about disability
At the end of the period you both decide if you can work together	Medication and possible side effects
<b>Basic Teaching Steps</b>	Diet restrictions
Introduce the task	Equipment and home arrangements
Provide written instructions	What to do in case of medical situations
Explain in detail the steps of the task	Name and contact information for doctor
Demonstrate the task (you or another PA)	<b>Review Work Performance</b>
Repeat the demonstration as often as needed	Daily tasks/checklists every two weeks
Imitate - have the new PA try the steps of the task	Weekly tasks/checklists every month
Refine and correct all steps	Monthly tasks/checklists every three months
Give Feedback, praise or gently correct any mistakes	The more often work is checked, the sooner a small problem can be fixed
<b>Tips for Supervising</b>	<b>Communication</b>
Be patient with mistakes and questions	Use “I” statements rather than “You” statements
Once a task has been learned don’t keep telling the PA how to do it	Highlight your reaction and feelings, rather than their actions
Show appreciation for what your PA does well. Praise often	Listen to what your PA says
Be kind and respectful	Clearly explain any issues
Let the PA know that your relative’s life IS his or her life and your PA is “assisting” and not “directing” it	